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Subchapter 73A CSRS
Part 73A1 General Information**Section 73A1.1-1 Overview**

A. Introduction

There are two kinds of death benefits:

1. Children's Monthly Survivor Annuity

Survivor annuities may be payable to dependent children upon the death of an employee or retiree. This annuity is provided by law. An employee or retiree does not need to elect it.

2. Lump-Sum Payment

A lump-sum payment may be payable to one or more children, if there is no one higher in the order of precedence, upon the death of an employee or retiree only if there is no one entitled to a survivor annuity.

NOTE 1: This Chapter covers monthly survivor annuity payments only. For information on lump-sum payments, see Chapter 32, Refunds, and Chapters 70, Spouse Benefits - Death of an Employee, and 72, Spouse Benefits - Death of a Former Employee, as they apply.

NOTE 2: A retiring employee who is in good health also may elect an insurable interest annuity for a child. See Chapter 52, Survivor Elections.

B. Topics Covered

This subchapter covers:

- The requirements that any child must meet to be eligible for survivor benefits;
 - The amount of children's survivor benefit;
 - The duration of a child's survivor annuity; and
 - The procedures an agency and a parent or guardian must follow to initiate payment of children's survivor benefits.
-

Section 73A1.1-1 Overview (Cont.)

- C. Organization of Subchapter** The CSRS subchapter has five parts.

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NOTE: The subchapter about death benefits for children under FERS begins on page 19.

- D. Statement of Authority** This subchapter is based on the laws and regulations cited below.

- United States Code: 5 U.S.C. 8341(a)(4),(e)(2),(e)(3)
 - Code of Federal Regulations: 5 CFR 831.615-17
-

Part 73A2 Eligibility Requirements**Section 73A2.1-1 Summary of Eligibility Requirements**

A. General Requirements

If a child meets the eligibility requirements of paragraph B below, monthly survivor annuity benefits are automatically payable upon the death of:

1. A retiree; and
2. An employee who:
 - Completed at least 18 months of creditable civilian service at the date of death; and
 - Died while subject to CSRS.

B. Specific Requirements

To qualify for a survivor annuity, the child (including a legally adopted child) of a deceased employee or retiree:

1. Must have been dependent (defined in section 73A2.1-2 below) on the employee or retiree at the time of death;
 2. Must be unmarried; and
 3. Must be:
 - Under age 18;
 - Age 18 to 22 and a full-time student; or
 - Over age 18 and incapable of self-support due to a disability incurred before age 18.
-

Section 73A2.1-2 Dependent Child

A. Dependency

1. OPM considers a child under age 18 to have been dependent upon the deceased employee or retiree if the child is:
 - A legitimate child;
 - An adopted child, including a child described in paragraph B below;
 - A stepchild who meets the requirements of paragraph C below; or
 - A child born out of wedlock who meets the requirements of paragraph D below.
 2. In general, no additional documentation is required if a child of the deceased is listed on SF 2809's and there is no discrepancy regarding the child's date of birth. However, if the child is not listed on SF 2809's, or the child was adopted, born out of wedlock, or a stepchild of the deceased, a copy of the child's birth certificate must be submitted with the application for death benefits. If the child was adopted, a copy of the final decree of adoption must also be submitted.
-

B. Adoption in Process at Employee's Death

1. A child whose adoption was in process at the time of the employee's or retiree's death may be entitled to survivor annuity benefits as an adopted child if:
 - The child was living with the employee or retiree at the time of death;
 - A petition for adoption had been filed by the employee or retiree prior to his or her death; and
 - The final decree of adoption is subsequently granted to the decedent's surviving spouse.
 2. The person who is applying on behalf of the child must provide a statement that the child was living with the deceased employee or retiree at the time of death and submit copies of the petition for adoption and the final decree of adoption.
-

C. Stepchild

1. A stepchild may be entitled to survivor annuity benefits if the child lived with the employee or retiree in a regular parent-child relationship at the time of the employee's or retiree's death.

NOTE: Temporary separations (for example, a child at college) are not a bar to meeting the "living with" requirement.

Section 73A2.1-2 Dependent Child (Cont.)

- C. Stepchild (Cont.)**
2. The person who is applying on behalf of the child must submit an affidavit from himself or herself and two affidavits from disinterested parties (for example, neighbors or friends) in a position to know the situation. The affidavits should show the following details:
- Whether the child lived with the deceased in a regular parent-child relationship.
 - The length of time the parent-child relationship existed. (If they lived apart at any time, explain.)
 - Whether the deceased exercised parental responsibility and control over the child.
 - A statement explaining how the affiant is in a position to know the facts of the case.
-
- D. Child Born Out of Wedlock**
- A recognized child born out of wedlock is considered dependent if:
1. The child lived with the employee or retiree in a regular parent-child relationship at the time of the employee's or retiree's death and the person applying on behalf of the child submits affidavits as described in paragraph C attesting that a parent-child relationship existed;
 2. The child did not live with the employee or retiree in a regular parent-child relationship but a judicial determination of support was obtained for the child;
 3. The Social Security Administration (SSA) awarded benefits to the child based on the earnings record of the deceased, as documented by a copy of SSA's award letter; or
 4. Evidence shows that the child was supported by the employee or retiree with regular and substantial contributions by one or more of the following:
 - Evidence of eligibility as a dependent child for benefits under other State or Federal programs;

Section 73A2.1-2 Dependent Child (Cont.)**D. Child Born Out
of Wedlock
(Cont.)**

- Proof of inclusion of the child as a dependent on the decedent's income tax returns for the year immediately before the employee's death;
- Canceled checks, money orders, or receipts for periodic payments received from the employee or retiree for or on behalf of the child;
- Evidence of goods or services that show regular contributions of considerable value;
- Proof of coverage of the child as a family member under the employee's or retiree's Federal Employees Health Benefits enrollment; and
- Other proof of a similar nature that OPM may find to be sufficient to demonstrate support or parentage.

NOTE 1: If a Federal income tax return is submitted, it must be the last return filed by the decedent or his or her estate. The copy of the tax return must be accompanied by (1) an affidavit from the person who is filing on behalf of the child or a certification from the Internal Revenue Service that it is a true copy of the original; and (2) the address of the Internal Revenue Service office where the tax return was filed.

NOTE 2: OPM may deny survivor benefits if evidence:

- Shows the deceased employee or retiree did not recognize the claimant as his or her own despite a willingness to support the child; or
 - Casts doubt upon the parentage of the claimant, despite the decedent's recognition and support of the child.
-

Section 73A2.1-3 Child Attending School

A. Requirements

For a child to be eligible for continuation of the survivor annuity beyond age 18 due to his or her status as a student, the child must:

1. Remain unmarried;
2. Regularly pursue a full-time course of study at a recognized educational or training institution that certifies that the child is regularly pursuing a full-time day or evening course of resident study or training.

NOTE: When a child is identified as a student on the SF 2800, Application for Death Benefits, OPM will request certification of the child's school attendance from the child's payee and the appropriate school official. OPM will determine the child's eligibility for benefits after receipt of the certification form. A copy of the OPM student certification form, RI 25-41, is contained in subchapter C for local reproduction. It will speed OPM processing of an application if a completed certification accompanies the application.

B. Recognized Educational Institutions

A recognized educational institution is a school that is accredited, has a faculty, and requires study or training to be done at the school. Included are:

- High schools;
 - Trade schools;
 - Technical or vocational institutes;
 - Business schools;
 - Junior colleges; and
 - Colleges, universities, or comparably recognized educational institutions.
-

Section 73A2.1-3 Child Attending School (Cont.)**C. Educational Institutions Not Qualifying**

Attendance at any of the following is not qualifying for children's benefits beyond age 18:

- Correspondence schools;
 - Elementary schools;
 - Government service academies (for example, U.S. Naval Academy); or
 - Any training program where the trainee receives pay primarily as an employee (for example, apprenticeship programs).
-

D. Full-Time Course of Study

A full-time course of study consists of:

1. School attendance at the rate of at least 36 weeks per academic year; and
2. A subject load sufficient, if successfully completed, to attain the educational or training objective within the period generally accepted as minimum for completion by a full-time day student of the academic or training program concerned.

EXAMPLE 1: High schools generally require 25 to 35 actual clock hours of class attendance each week to consider a student as full-time. For special programs, they require a minimum of 20 hours per week.

EXAMPLE 2: Colleges, junior colleges, and universities generally require a minimum number of semester hours or quarter credit hours to graduate in the normal length of time. Although a student carrying fewer credit hours may be designated as full-time for tuition purposes, this does not necessarily establish eligibility for student benefits.

Section 73A2.1-3 Child Attending School (Cont.)**D. Full-Time
Course of Study
(Cont.)**

EXAMPLE 3: Vocational or technical schools generally require that students make this schooling their principal activity. This means that the student spends as much as 40 clock hours each week in activities related directly to training in the school. Normally, the activities take place at school.

EXAMPLE 4: Acceptable work-study programs generally require some regularly scheduled class attendance; together, the class attendance and the work periods constitute a full-time course of training.

Section 73A2.1-4 Child Incapable of Self-Support

A. Requirements

1. A child who is age 18 or older and incapable of self-support due to physical or mental disability may be entitled to a survivor annuity if:
 - The requirements in paragraph B of section 73A2.1-1 are met; and
 - OPM determines that the child is incapable of self-support because of a physical or mental disability incurred before he or she reached age 18.
 2. The medical conditions that qualify as disabling for annuity purposes generally also qualify for continuation of FEHB coverage. See the list of qualifying conditions in The Federal Employees Health Benefits Handbook for Personnel and Payroll Offices (formerly FPM Supplement 890-1) for further information.
-

B. Content of Documentation

1. OPM must be provided with information from the disabled child's parent or guardian about the child's education, any employment, and residence. In addition, the child's doctor must provide information about the child's medical condition. Subchapter C contains a copy of OPM Form RI 25-43, Documentation in Support of Claim for CSRS or FERS Benefits as Disabled Dependent Child, for local reproduction. This form outlines the specific information needed.
 2. The applicant is responsible for any cost incurred in obtaining the doctor's statement and sending it to OPM.
 3. An alternative to OPM Form RI 25-43 is a copy of the letter from the Social Security Administration awarding benefits to the child based on SSA's finding that the child is incapable of self-support because of a physical or mental disability incurred before age 18.
-

C. Submission of Documentation

If the disability exists at the time the application for death benefits is made, and the disabled child is 18 or older, attach the SSA award letter or OPM Form RI 25-43 to the Application for Death Benefits (SF 2800). (See section 73A5.1-1 for further procedural details.)

If the disabled child is under 18 when the application for death benefits is made, the OPM Form RI 25-43 or SSA award letter should be submitted 90 days before the child reaches age 18. The information must be accompanied by a letter requesting a continuation of benefits because of the disability.

The letter and documentation or SSA award letter should be sent to: **Office of Personnel Management, Retirement Operations Center, Boyers, PA 16017**. The letter must include the name and date of birth of the deceased employee or retiree and the case number (CSF number).

Part 73A3 Amount of Benefits

Section 73A3.1-1 Amount of Benefits

A. General	The children's survivor benefit is a specific dollar amount that is established by the formula in U.S.C. 8341(e)(2) and increased by CSRS COLA's. This benefit is payable in addition to any survivor annuity payable to a spouse. Each child's rate is determined individually based on circumstances described below.
B. Single Orphan Rate	When the child has a living parent who was married to the employee or retiree (either at death or at any time prior to date of death), the benefit payable to that child is usually the lesser of: 1. \$327 per month per child; or <u>2. \$981 per month divided by the number of eligible children.</u>
C. Double Orphan Rate	When the child has no living parent who was married to the employee or retiree the benefit payable to that child is usually the lesser of: 1. \$393 per month per child; or <u>2. \$1,179 per month divided by the number of eligible children.</u>
D. Note Regarding Rates in B and C	The rates quoted in paragraphs B and C above are for survivor annuities payable from April 1, 1996, through December 31, 1996 . These rates will increase by future CSRS COLA's that occur on or after December 1, 1996. In cases where the employee or retiree worked part-time or had a low salary, the rates in B and C may be less.
E. Recomputation of Benefits	If a parent who was married to the employee or retiree dies before the benefit to the child ends, the annuity to the child is increased from the Single Orphan to the Double Orphan rate. In situations where benefits are being paid to more than three children upon termination (for any reason) of the annuity to one child, the annuities to any remaining children are recomputed prospectively as though the terminated child had never been entitled to the benefit. <u>If a new child is added (for example, a child born after the death of the employee or retiree), individual rates may be decreased.</u>

Section 73A3.1-1 Amount of Benefits (Cont.)**F. Payment**

OPM pays a child's annuity to:

1. The parent or other person who has care and custody of the child, if there is no court-appointed guardian;
2. The guardian, if one has been appointed by the court; or
3. A child over 18, upon request by the child or other payee on the claim.

NOTE: In general, the children's survivor benefit is included in the monthly payment of the surviving parent when he or she is also a beneficiary and has care and custody of the children.

Part 73A4 Duration of Benefits**Section 73A4.1-1 General Rules**

A. Beginning Date A child's survivor annuity benefits begin on the day following an employee's or retiree's death or, in the case of a posthumous child, on the day following the child's birth.

B. Ending Date A survivor annuity to a child under 18 ends on the last day of the month preceding the month in which he or she:

- Marries;
- Dies; or
- Becomes 18.

NOTE 1: If the child's annuity ends because of marriage and that marriage is annulled, the survivor annuity may be restored under some circumstances.

NOTE 2: If the child is a student or disabled, see sections 73A4.1-2 and 73A4.1-3.

Section 73A4.1-2 Ending Date: Child Attending School

A. Rule	<p>In the case of a child over 18 and attending school, the annuity ends the last day of the month preceding the month in which he or she:</p> <ul style="list-style-type: none"> • Marries; • Dies; • Ceases to be a student (see paragraph C below); • Transfers to a nonrecognized school; • Begins attending school less than full-time; • Fails to submit proof, upon request, that he or she is attending school full-time; • Enters military service or a government service academy; or • Becomes age 22 (see paragraph B below).
B. Birthday Falls During School Year	<p>A child whose 22nd birthday falls during the school year (September 1 through June 30) is considered not to have attained age 22 until July 1st.</p>
C. Nonschool Intervals (Vacations)	<p>A survivor annuity continues during nonschool intervals of not more than 5 months between school years or terms of the student shows a clear intention to continue as a full-time student at the same or a different school.</p>
D. Resumption of Studies	<p>Any child's annuity that ended because the child was over 18 and ceased to be a student, may be resumed (or authorized for the first time) if he or she becomes a full-time student before age 22 and if the lump-sum benefit (if any) that was paid upon termination of the annuity is paid back to OPM.</p>

Section 73A4.1-3 Ending Date: Disabled Child Over Age 18

A. Rule	<p>The annuity of a disabled child over the age of 18 terminates on the last day of the month preceding the month in which he or she:</p> <ul style="list-style-type: none">• Marries;• Recovers from the disability;• Becomes capable of self-support; or• Dies.
B. Becomes Capable of Self-Support	<p>If OPM determines that the child has become capable of self-support, the annuity can continue until age 22 if the child is a full-time student.</p>
C. Recurrence of Disability After Termination	<p>If a child's annuity ends because he or she recovers from a disability or becomes capable of self-support, the CSRS law does not permit the annuity to be reinstated even if the disabling condition recurs or the child again becomes incapable of self-support.</p>

Part 73A5 Procedures**Section 73A5.1-1 Procedures When Employee Dies**

**A. Agency
Responsibility**

1. When an employee dies, the agency:
 - Contacts the next of kin or emergency addressee and advises him or her of the right to apply for death benefits;
 - Informs the next of kin about what benefits may be payable;
 - Assists the next of kin in completing the SF 2800, Application for Death Benefits;
 - Submits the applicant's SF 2800 to OPM with the employee's Individual Retirement Record (SF 2806) if the applicants sends the SF 2800 to the agency before the SF 2806 is transmitted to OPM;
 - Completes the SF 2801-1, Certified Summary of Federal Service;
 - Completes the SF 2800A, Agency Certification for Death in Service; and
 - Submits the deceased employee's Individual Retirement Record (SF 2806), the SF 2801-1, and the SF 2800A to OPM within 30 days of the employee's death. If the next of kin completes an SF 2800, the agency submits that form as well.
2. When a student over 18 is involved, it will expedite OPM's processing of the application if a completed student certification form, RI 25-41, is sent with the application for benefits. Subchapter 73C contains a copy of the form for local reproduction. Likewise, if there is a disabled child over age 18, providing documentation of the disabling condition with the application for benefits will expedite OPM's processing. Subchapter C contains a copy of OPM Form RI 25-43 that may be used, or a copy of the SSA award letter may be submitted.
3. The agency should submit the deceased employee's records and any available information about potential payees to OPM as early as possible so they are received within 30 days of the employee's death.

Section 73A5.1-1 Procedures When Employee Dies (Cont.)**A. Agency
Responsibility
(Cont.)**

NOTE: When contacted by the survivor of a retiree, the agency should refer the survivor to the following address for additional information, death benefit applications, etc.:

**Office of Personnel Management
Retirement Operations Center
Boyers, PA 16017**

The survivor should provide OPM with the retiree's name, date of birth, date of death, CSA number, and Social Security number.

**B. Parent/Guardian
Responsibility**

1. The parent, legal guardian, or person with care and custody of the child should:
 - Complete the SF 2800, Application for Death Benefits;
 - Attach any other forms or evidence as required -- guardianship papers, medical documents for disabled children over age 18, proof that the child is a natural child, school certification, birth certificate, if the child was adopted, born out of wedlock, or a stepchild of the deceased, etc.
2. A surviving spouse or former spouse who is entitled to a benefit in his or her own right, and also on behalf of the child, only needs to file one application.
3. If the employing agency of a deceased employee has not yet forwarded the employee's records to OPM, the applicant sends the completed application to the employing office.

In all other cases, the applicant sends the completed application to:

**Office of Personnel Management
Retirement Operations Center
Boyers, PA 16017.**

**C. OPM
Responsibility**

OPM determines what benefits are payable and, depending upon the type of benefit and other circumstances in a particular case, may request the applicant to submit additional evidence.

D. Health Benefits

Where survivor benefits are payable, any health benefit premiums are withheld from the monthly survivor annuity.

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Subchapter 73B FERS
Part 73B1 General Information

Section 73B1.1-1 Overview

- A. Introduction** Subchapter 73B contains the rules and policies that apply to children's survivor benefits under the Federal Employees Retirement System (FERS).

This subchapter explains how FERS differs from CSRS. It refers readers to the CSRS rule that applies or gives the FERS rule if it is different.

- B. Organization of Subchapter** The FERS subchapter has three parts.

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- C. Applicable CSRS Provision** The following part of subchapter 73A is applies entirely to FERS employees.

- Part 73A2: Eligibility Requirements

- D. Statement of Authority** This subchapter is based on the laws and regulations cited below.

- United States Code: 5 U.S.C. 8443
 - Code of Federal Regulations: 5 CFR Part 843, Subpart D
-

Part 73B2 Benefits Payable**Section 73B2.1-1 Amount of Benefits**

A. General Rule

A child's survivor annuity rate is:

1. The total amount payable to all children under CSRS;
2. Less the total amount payable to all children by Social Security; and
3. Divided by the number of children.

A child's survivor annuity is payable in addition to any survivor annuity payable to a spouse.

B. Employee Requirements

For a survivor annuity to be payable, the employee must have:

1. Completed at least 18 months of creditable civilian service; and
 2. Died while subject to FERS.
-

Section 73B2.1-2 Social Security

- A. General Rule** Any monthly FERS survivor benefit payable to any child of the deceased employee or retiree is reduced (offset) by the TOTAL amount of any Social Security survivor benefit payable to all children based on the Social Security earnings of the deceased employee or retiree. In many cases, the FERS benefit is reduced to \$0.
- There is no offset or reduction in any month for which the child is not entitled to insurance benefits from Social Security. For example, if Social Security benefits end because the child attained age 19, FERS survivor benefits are payable until age 22 if the child is still in school.
- B. Agency Responsibility** Agencies should encourage survivors to apply for Social Security benefits for children as soon as possible. (See Standard Form 3104 and 3104B)
- C. OPM Requirement** OPM requires evidence of Social Security entitlement or nonentitlement before making any payments. (See Standard Form 3104 and 3104B)
- However, because of the Social Security offset, OPM presumes that there will be no FERS survivor benefit payable to children under age 19.
- D. Survivor Responsibility** The parent, legal guardian, or other person with care and custody of children must:
1. Complete Standard Form 3104 and 3104B on behalf of the child or children; and
 2. Submit a copy of the SSA award or denial letter to OPM when they receive it.
- E. Failure to Submit SSA Award/Denial Letter** Normally, failure to submit the SSA award or denial letter with the application (and related documents) will not result in a delay in processing the case or in the payment of other benefits because of OPM's presumption that no benefits are payable to children under age 19.
- Delay **will** result in cases where Social Security is not paying benefits to any child, or in the unusual case where the amount of the Social Security benefit does not completely offset the FERS benefit.
- >Under Public Law 104-121, approved March 29, 1996, a stepchild under Social Security must receive at least half of his or her support from the deceased stepparent in order to qualify for Social Security benefits. A child living with a stepparent is not automatically eligible for survivor benefits.

Section 73B2.1-2 Social Security (Cont.)**E. Failure to
Submit SSA
Award/Denial
Letter (Cont.)**

However, under Social Security a child not living with the stepparent is also not automatically disqualified so long as he or she received at least half support from the deceased stepparent.

Under CSRS and FERS law, to be eligible for survivor annuity benefits, a stepchild must be dependent on, and living with, the deceased parent at the time of death; however, the term "dependent" is, under the statutory definition, met for a stepchild if the stepchild is living with the stepparent. With the CSRS and FERS laws, unlike under Social Security, the term "dependent" does not require half support. A stepchild may be eligible for FERS benefits when not eligible for Social Security, if he or she was living with the deceased stepparent at the time of death, even if half support is not established.<

Section 73B2.1-3 Duration of Benefits

- | | |
|-------------------------------------|--|
| A. Applicable CSRS Provision | The CSRS rules on how long survivor benefits can be paid to children apply under FERS, with one exception. The exception is noted below. |
| B. Exception | Unlike the CSRS law, the FERS law allows reinstatement of benefits to a disabled child over age 18 if OPM finds that the child again has become incapable of self-support. |
-

Part 73B3 Procedures**Section 73B3.1-1 Procedures**

- | | |
|---------------------------|--|
| A. General | The procedures under FERS are the same as under CSRS with the exceptions noted below. |
| B. Forms | <hr/> <ol style="list-style-type: none">1. The Application for Death Benefits is the SF 3104.2. <u>Standard Form 3104B applies only to FERS.</u> |
| C. Health Benefits | <hr/> Where survivor benefits are payable, health benefits premiums are withheld from the monthly survivor annuity.

In the situation where any child's FERS benefit is reduced below the amount necessary to pay the FEHB premium because of Social Security benefits received, the child (or children) can continue FEHB coverage by making direct payments to OPM. OPM will provide the payee with the procedures for making direct payments. <hr/> |

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Subchapter 73C Job Aids**Section 73C1.1-1 Local Reproduction Forms**

This subchapter contains copies of the following OPM forms for local reproduction:

Number	Name
RI 25-41	Initial Certification of Full-time School Attendance
RI 25-43	Documentation in Support of Claim for CSRS or FERS Benefits as a Disabled Dependent Child

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UNITED STATES OFFICE OF PERSONNEL MANAGEMENT RETIREMENT PROGRAMS WASHINGTON, D.C. 20415	INITIAL CERTIFICATION OF FULL-TIME SCHOOL ATTENDANCE
<div style="display: flex; justify-content: space-between;"> <div style="width: 65%;"> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">Reference</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">Date</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"> Claim number (suffix) CSF </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">Name of deceased employee</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">Name of child</div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <div style="width: 60%; border-bottom: 1px solid black;">Date of death</div> <div style="width: 35%;"> On roll? <input type="checkbox"/> Yes <input type="checkbox"/> No </div> </div> </div> <div style="width: 30%;"></div> </div>	

The Application for Death Benefits shows that the child named above, a survivor of a Federal employee or annuitant, is (or soon will be) age 18. After reaching age 18, a child is eligible for a survivor annuity only if unmarried and (1) a full-time student in a recognized school or (2) incapacitated for self-support because of a physical or mental disability that began before age 18.

If a child is unmarried and incapacitated for self-support because of a mental or physical disability, do not fill in the other side of this form. Instead, return the form to us with a doctor's certificate describing the nature and extent of the child's disability. After we review the documentation of the disability, we will write to you about the child's eligibility for benefits.

If the child is unmarried and a full-time student, you should complete Part A on the other side of this form; a school official should complete Part B, and you should return the completed form to us promptly. If the child's school year was not in session on the date of death (shown above), have the school official complete Part B for the **last school year attended**.

Send the completed form to:

U.S. Office of Personnel Management
Retirement Programs
P.O. Box 956
Washington, DC 20044.

Privacy Act Statement
<p>The information requested on this form is needed to determine whether the child is eligible for benefits beyond the age of 18 as provided in Title 5, U.S. Code, Chapters 83 and 84. This information will be shared with the General Accounting Office and the U.S. Department of Justice in the event litigation is required to enforce collection of a overpayment of annuity benefits. It may also be disclosed to other Federal agencies or Congressional offices which have a need to know it in connection with your application for a job, license, grant or other benefits, or in connection with possible violation of law. It may also be shared with national, state, local or other charitable or social security administrative agencies to determine and issue benefits under their programs. While the law does not require you to supply all of the information requested on this form, it may not be possible to determine the child's entitlement to benefits if you fail to do so.</p>
Public Burden Statement
<p>We think this form take an average 20 minutes per response to complete, including the time for reviewing instructions, getting the needed data, and reviewing the completed form. Send comments regarding our estimate or any other aspect of this form, including suggestions for reducing completion time, to the Paperwork Reduction Project, OMB Clearance Number 3206-0099, Office of Management and Budget, Washington, DC 20503 or Reports and Forms Management Officer, U.S. Office of Personnel Management, 1900 E Street, NW., Room 6410, Washington, DC 20415.</p>

(THIS SPACE IS FOR THE USE OF THE OFFICE OF PERSONNEL MANAGEMENT ONLY.)			
Remarks:	<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> APPROVED <input type="checkbox"/> NOT APPROVED BECAUSE </div> <div style="margin-top: 10px;"> <input type="checkbox"/> Less than full-time school attendance <input type="checkbox"/> Not in school <input type="checkbox"/> Over 5-month break in attendance <input type="checkbox"/> Married <input type="checkbox"/> Non-recognized school <input type="checkbox"/> Other (specify) </div>		Call up (M-Card) processed
	<div style="border-bottom: 1px solid black; height: 20px;"></div>		Examiner
	Inspector	Date	Date

Previous editions are usable

RI 25-41
(formerly BRI 49-224-1)
Revised February 1989

Chapter 73

Part A - To be completed by the payee (the person who expects to receive benefits for the student).

Read the reverse side of this form before answering the questions below; give full information; typewrite or print in ink.

1. Student's name (first, middle, last)		2. Student's date of birth (month, day, year)		3. Student's Social Security number	
4. Is the student married?		<input type="checkbox"/> Yes → If "Yes", show the date at right, sign in item 7 of this part, and return this form. (It is not necessary to complete the rest of the form.) <input type="checkbox"/> No		Date of marriage	
CURRENT STATUS	5. Is the student enrolled in school on a full-time basis at the present time?		<input type="checkbox"/> Yes If "No", show the date the student last attended school on a full-time basis. <input type="checkbox"/> No →		Last attended school (month, day, year)
FUTURE PLANS	6. After the end of the school year, does the student intend to continue as a full-time student with less than a 5-month break between years?		<input type="checkbox"/> Yes → If "Yes", give the details in items 6a and 6b. <input type="checkbox"/> No <input type="checkbox"/> Undecided } If "No", or "Undecided", do not complete items 6a and 6b.		
	6a. Enter the date (or approximate date) the next school year or term begins after current enrollment (month, day year)		6b. Complete name and mailing address (including ZIP code) of the educational institution the student will attend next year.		
PAYEE SIGNS HERE	7. I certify that all information given in this certification is true and correct to the best of my knowledge and belief. I understand that I must immediately notify the Office of Personnel Management (OPM) if the student transfers to another school, discontinues school attendance, reduces attendance to less than full-time, marries, or dies. I further agree to return all overpayments of student benefits, including overpayments that may be erroneously made after I notify OPM of any terminating event.				
	Signature of payee				Date

Part B - To be completed by an official of the educational institution for the school year _____ to _____.
(month, year) (month, year)

6. Is/was the student enrolled in and attending a full-time course of resident study or training (not correspondence) for the period requested? <input type="checkbox"/> Yes <input type="checkbox"/> No		2. Actual date the student started school for the school year indicated above (month, day, year).		3. Official ending date of that school year (month, day, year).																							
4. Check thy type of educational institution: <input type="checkbox"/> High school <input type="checkbox"/> Junior college <input type="checkbox"/> Trade school <input type="checkbox"/> College or university <input type="checkbox"/> Technical institute <input type="checkbox"/> Other (specify) <input type="checkbox"/> Vocational institute				5. Show the complete name and mailing address (including ZIP code) of the educational institution.																							
6. Show the total school hours per week: a. If college or equivalent, show credit hours..... b. If high school or equivalent, show actual clock hours..... c. If in a work-study program sponsored by the school, show hours at work hours at school				7. Circle the student's highest grade level: <table border="1"> <tr> <td colspan="6">High School</td> <td colspan="4">College</td> <td>Other</td> </tr> <tr> <td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td> <td>1</td><td>2</td><td>3</td><td>4</td> <td></td> </tr> </table>		High School						College				Other	7	8	9	10	11	12	1	2	3	4	
High School						College				Other																	
7	8	9	10	11	12	1	2	3	4																		
Complete the following items if your institution is not a state college, state university, or public high school.																											
8. Show the complete name and address (including ZIP code) of the organization which accredits, licenses, or otherwise recognizes the school.				9. If the educational institution is licensed, show: a. Current license number: b. Expiration date of current license (month, day, year)																							
SCHOOL OFFICIAL SIGNS HERE	I certify that the information given in regard to requested school enrollment of the above-named student is true and correct to the best of my knowledge and belief.																										
	Signature of official of the educational institution																										
	Title		Date																								

Warning: Any intentional false statement, willful concealment of material fact, or use of a writing or document knowing the same to contain a false, fictitious, or fraudulent statement or entry, is a violation of the law punishable by a fine of not more than \$10,000 or imprisonment of not more than 5 years, or both. (18 U.S.C.1001)

**Documentation in Support of Claim
for CSRS or FERS Benefits as a Disabled Dependent Child**

OPM needs the information requested below to determine whether a child over age 18 is eligible for a survivor annuity. A child over age 18 may be eligible for an annuity if he or she is incapable of self-support because of a physical or mental disability incurred before he or she reached age 18. In addition, the child must have been a dependent child of the deceased Federal employee or retiree on whose employment the annuity is based, and the child must be unmarried.

Name of Deceased (<i>first, middle, last</i>)	Date of Birth of Deceased	Social Security of Deceased
Name of Disabled Dependent (<i>first, middle, last</i>)	Date of Birth of Disabled Dependent	CSF Number

A. To be completed by disabled dependent child, parent, or guardian:

1.	Does the disabled dependent child live with parent, guardian, or at a residential facility? If the disabled dependent resides at a residential facility, please provide the name and address of the facility in the space below:
2.	Is there a court-appointed guardian or fiduciary to handle the affairs of the disabled dependent? If so, please attach a copy of the court order.
3.	Is the disabled dependent now employed, or has he or she been employed during the last twelve months?
4.	If the answer to question 3 is yes, please state the period and type of employment, the amount of earnings, and whether employment was in a closely supervised environment, i.e., closed workshop.
5.	Highest level of education of disabled dependent.

The Office of Personnel Management (OPM) will not pay for any expenses that are incurred when securing the requested medical information from the physician.

I certify that the information provided above is correct.	
Date	Signature of Disabled Dependent Child, Parent, or Guardian
Address	Telephone

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February 1990

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B. To be completed by the physician:

Name of deceased (<i>first, middle, last</i>)	Date of birth of deceased	Social Security Number of deceased
Name of disabled dependent (<i>first, middle, last</i>)	Date of birth of disabled dependent	CSF Number
In order to determine if your patient is eligible for benefits under the retirement law, we need information regarding the current medical condition.		
1. Diagnosis of disability.	2. Age at onset.	
3. Severity of disability (<i>circle one</i>): Mild Moderate Severe.	4. Estimate of expected date of full or partial recovery.	
5. If patient is mentally retarded, please state approximate mental age.	6. I.Q. test results.	
In addition, attach a narrative addressing the following points:		
<ol style="list-style-type: none"> 1. The history of the specific medical condition(s), including reference to findings from previous examinations, treatment, and responses to treatment. 2. Clinical findings from your most recent medical evaluation, including findings of physical examination, results of laboratory test, x-rays, EKG's and other special evaluations or diagnostic procedures and in the case of psychiatric disease, the findings of mental status examination and the results of psychological tests. 3. Assessment of the current clinical status and plans for future treatment. 4. An explanation of the impact of the medical condition on life activities. For example, is the patient capable of handling finances? 5. Assessment of the degree to which the medical condition has or has not become static, well stabilized or controlled, and an explanation of the medical basis for the conclusion. 		
Signature	Please Print Name	
Street Address	Date	
City, State, and Zip Code	Telephone Number	

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